



## **ASCENDER Business Release Notes**

# ASCENDER/TxEIS Business Release Notes

## Release 3.5

## ASCENDER

**Release Date:** 5/11/2021 **ASCENDER Update:** 5.0.0207

### ASCENDER Homepage > Dashboard > Approval Summary

- ☐ Corrected the program to display Finance budget amendment approvals from file ID C along with any approvals in the previous file ID associated with file ID C.
- ☐ Corrected the program to display Warehouse approvals.

**Prior Release Notes for ASCENDER/TxEIS Business 3.5**

[Update 5.0.0206](#)

## ASCENDER

**Release Date:** 4/19/2021 **ASCENDER Update:** 5.0.0206

### Finance > Maintenance > Postings > Check Processing - PA & Check Processing - PO

- ☐ Corrected the **Document** (Document Attachments) link to properly function when the **Invoice Nbr** contains spaces or allowed special characters.

### Finance > Maintenance > Credit Card > Posting - PA & Posting - PO

- ☐ Added a scroll bar to the Credit Card Transactions table to prevent credit card transactions from overlapping into the Account Code Summary table when adding multiple transaction lines (+10).

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## Finance > Budget Amendment

☐ Corrected the **Documents** (Document Attachments) button to properly display and function when the budget **Amendment Nbr** contains spaces or allowed special characters.

[Update 5.0.0204](#)

## ASCENDER

**Release Date:** 4/7/2021 **ASCENDER Update:** 5.0.0204

### Document Attachments

☐ Corrected the program to remove the case-sensitive validation from the document file extension. Previously, this issue prevented some documents from being successfully uploaded.

☐ Corrected the program to allow documents with multiple periods in the document name (e.g., doc.3.5.pdf ) to be successfully uploaded.

[Update 5.0.0202](#)

## ASCENDER

**Release Date:** 3/30/2021 **ASCENDER Update:** 5.0.0203

### Personnel > Utilities > ACA 1094/1095 Correction/Replacement > 1094/1095-C

☐ Corrected the issue that prevented the ACA 1095-C correction file from being processed.

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## TxEIS

**Release Date:** 3/30/2021 **TxEIS Update:** 3.5.0234

### Human Resources > Utilities > ACA 1094/1095 Correction/Replacement > 1094/1095-C

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- ☐ Corrected the issue that prevented the ACA 1095-C correction file from being processed.

[Update 5.0.0202\\_3.5.0233](#)

## ASCENDER

**Release Date:** 3/23/2021 **ASCENDER Update:** 5.0.0202

### **Payroll > Payroll Processing > Payroll Adjustments > Check Void**

- ☐ Corrected the issue that prevented a check from being voided after the original payroll run inadvertently caused multiple checks to be generated for an employee.

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### **Personnel > Maintenance > Staff Demo > Responsibility**

- ☐ Modified the program to display the **Grade Level** field on this tab as well as the User Created Reports page. Previously, the field was not displayed.

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## TxEIS

**Release Date:** 3/23/2021 **TxEIS Update:** 3.5.0233

### **Human Resources > Payroll Processing > Payroll Adjustments > Check Void**

- ☐ Corrected the issue that prevented a check from being voided after the original payroll run inadvertently caused multiple checks to be generated for an employee.

[Update 3.5.0231](#)

**Release Date:** 3/1/21 **TxEIS Update:** 3.5.0231

### **Human Resources > Maintenance > Staff Job/Pay Data > Employment Info**

- ☐ Added the **Prior Teaching** field to the **Years Experience** section to indicate the total years of prior teaching experience for the employee.

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## Human Resources > Reports > HR Reports > Personnel Reports > HRS1250 - Employee Data Listing

☐ Added the **Yrs Prior Teaching** column to the **Experience** section.

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## Human Resources > Reports > User Created Reports > HR Report

☐ Added the **Yrs Prior Teaching** check box to the **Employment** section.

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## CareerPortal

**Release Date:** 3/1/21 **TxEIS Update:** 3.5.0231 **ParentPortal Update:** 5.0.0200

### Login

☐ Updated the application login page with new background images and creation/maintenance wizards.

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## EmployeePortal

**Release Date:** 3/1/21 **TxEIS Update:** 3.5.0231 **EmployeePortal Update:** 5.0.0200

### Login

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- ☐ Updated the application login page with new background images and creation/maintenance wizards.

## **EmployeePortal > Create Account**

- ☐ Modified the program to display a more informative error message when users try to create a new account with a duplicated user name. Now, the error message informs users that the selected user name is already in use at the LEA and they must select a different, unique user name.

## **EmployeePortal > Inquiry > 1095 Information**

- ☐ Corrected the issue that prevented the employee from printing the 2020 1095-C form. Previously, an "Oops" message was displayed.

## **EmployeePortal > Self-Service**

- ☐ Corrected the program to only highlight the updated fields. Previously, all fields available for edit were highlighted. Also, corrected the email message to only list the updated fields.

[Update 3.5.0227](#)

**Release Date:** 01/20/2021 **TxEIS/ASCENDER Update:** 3.5.0227 **EmployeePortal Update:** 4.0.1.19

## **EmployeePortal > Inquiry > W-2 Information**

- ☐ Corrected the issue that caused the Statutory Employee box to be selected when printing the W-2 even though it did not apply to the employee.

[Update 3.5.0226](#)

**Release Date:** 01/15/2021 **TxEIS/ASCENDER Update:** 3.5.0226

## **Finance > Reports > Finance Reports > Vendor/Purchase Order Reports > FIN2100 - 1099 Forms**

- ☐ Corrected the alignment on Form 1099-MISC Copy A to properly print the legal fees in Box 10.

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☐ Corrected the alignment on Form 1099-NEC Copy A to properly print the income and withholding tax amounts in the appropriate boxes. Also, added the withholding taxes to the submission file.

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### **Human Resources > Tables > ACA 1095 Codes > 1095-B Coverage Type**

☐ Updated the tab to support the 2020 tax year.

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### **Human Resources > Tables > ACA 1095 Codes > 1095-C Offer of Coverage**

☐ Updated the tab to support the 2020 tax year.

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### **Human Resources > Tables > ACA 1095 Codes > 1095-C Safe Harbor**

☐ Updated the tab to support the 2020 tax year.

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### **Human Resources > Utilities > ACA 1094/1095 Correction/Replacement**

☐ Per IRS requirements, updated the utility to support the 2020 tax year.

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### **Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5250 - 1095-B**

☐ Per IRS requirements, updated the 1095-B form/instructions and all 1095-B functionality to support the 2020 tax year.

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### **Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5255 - 1095-C**

☐ Per IRS requirements, updated the 1095-C form/instructions and all 1095-C functionality to support the 2020 tax year including adding the **Employees Age** and **Zip Code** fields to the form.

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## EmployeePortal

**Release Date:** 01/15/2021 **TxEIS/ASCENDER:** 3.5.0226 **EmployeePortal Update:** 4.0.1

### EmployeePortal > Inquiry > Calendar Year to Date

☐ Corrected various Marital Status issues for active employees who exist in multiple pay frequencies.

### EmployeePortal > Inquiry > W-2 Information

☐ Corrected the 2020 W-2 form instructions to include the Families First Coronavirus Response Act (FFCRA) information.

### EmployeePortal > Inquiry > 1095 Information

☐ Per IRS requirements, updated the 1095-B/1095-C form/instructions and all 1095 functionality to support the 2020 tax year.

### EmployeePortal > Inquiry > 1095 Information

☐ Corrected various 1095 Consent window issues.

### [Update 3.5.0219](#)

**Release Date:** 12/04/2020 **TxEIS/ASCENDER Update:** 3.5.0219

### Accounts Receivable > Maintenance > Invoice Payments > Payments

☐ Corrected the issue that prevented a payment from being posted to an invoice with an applied credit memo.

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### Finance > Inquiry > General Ledger Inquiry > General Ledger Inquiry Finance > Inquiry > GL Inquiry > GL Inquiry



☐ Updated the default Retrieve function to only display active account codes. Also, added the **Include Inactive Accounts** check box to display the inactive account codes in the inquiry.

Inquiry > General Ledger Inquiry SessionTimer: 239 min and 55 sec

General Ledger Inquiry | General Ledger Account Summary | Employee Distribution List Inquiry | Over Expended Account Summary

☒ Processed ☒ Current Period: 04 ☒ Next Period: 05 ☒ Include soft encumbrances when POs exist ☐ Exclude Objects 61XX ☐ **Include Inactive Accounts**

☒ Show Details Report will display Transaction Details

Description  
☐ Reason ☒ Vendor Name

Account Code: Fund Func Obj Subj Org Prog  
 XXX XX XXXX XX XXX XXX X XX X XX

Retrieve Reset

Inquiry > GL Inquiry SessionTimer: 239 min and 16 sec

GL Inquiry | GL History - Accounting Period | GL History - EOM

Retrieval Options  
☒ Processed ☒ Current Period: 04 ☒ Next Period: 05 ☒ Include soft Encumbrances when POs exist ☐ **Include Inactive Accounts**

Exclusions  
☐ Exclude Objects 61XX  
☐ Exclude Accounts with No Transactions

Description  
☐ Reason ☒ Vendor Name

Account Code: Fund Func Obj Subj Org Prog  
 XXX XX XXXX XX XXX XXX X XX X XX

Retrieve Reset

## Finance > Reports > Finance Reports > Vendor/Purchase Order Reports > FIN2050 - 1099 Report

☐ (Mandated Change) Added the **For Tax Year > 2019, Print 1099-MISC (M), 1099-NEC (N), or blank for ALL** parameter to report the following for tax years greater than 2019:

- Report all 1099-MISC (M) transactions in the 1099 work file except those tied to an object code with a **Type Payment** of *N - Non-employee compensation*.
- Report all 1099-Nonemployee Compensation (N) transactions in the 1099 work file that are tied to an object code with a **Type Payment** of *N - Non-employee compensation*.
- Leave blank to report all transactions in the 1099 work file.

Reports > Finance Reports > Vendor/Purchase Order Reports > 1099 Report SessionTime

[Return to Reports](#)

Report ID: **FIN2050**  
 File ID:  
 User ID:  
 Curr Per:  
 Next Per:

Parameter Description	Value
Sort by Alpha (A), EIN/SSN (N)	<input type="text"/>
Print Account Nbr (A), Reason (R)	<input type="text"/>
Include EIN/SSN on Report? (Y/N)	<input type="text"/>
For Tax Year > 2019, Print 1099-MISC (M), 1099-NEC (N), or blank for ALL	<input type="text"/>
From Date (MMDDYYYY), or blank for ALL	<input type="text"/>
To Date (MMDDYYYY), or blank for ALL	<input type="text"/>
Select Vendor(s), or blank for ALL	<input type="text"/> <a href="#">...</a>

## Finance > Reports > Finance Reports > Vendor/Purchase Order Reports > FIN2100 - Printing 1099-MISC Form

- ☐ **(Mandated Change)** Renamed this report from Printing 1099-MISC Form to 1099 Forms.
- ☐ **(Mandated Change)** Added the **For Tax Year > 2019, Print 1099-MISC (M) or 1099-NEC (N)** parameter to print the 1099-MISC or 1099-NEC forms for tax years greater than 2019.

Reports > Finance Reports > Vendor/Purchase Order Reports > 1099 Forms SessionTimer: 239 min and 56 sec

[Return to Reports](#)

Report ID: **FIN2100**  
 File ID:  
 User ID:  
 Curr Per:  
 Next Per:

Parameter Description	Value
Sort by Alpha (A), EIN/SSN (N), Zip Code (Z)	<input type="text"/>
Print 1099 Form only (1), 1099 form including 1099 file (2), Non-preprinted Copy B and C (3)	<input type="text"/>
Tax Year (####)	<input type="text"/>
For Tax Year > 2019, Print 1099-MISC (M) or 1099-NEC (N)	<input type="text"/>
Control Name (4 char, only required for 1099 file)	<input type="text"/>
Contact Name (40 char, only required for 1099 file)	<input type="text"/>
Control Code (5 char for 1099 file)	<input type="text"/>
Select Vendor(s), or blank for ALL	<input type="text"/> <a href="#">...</a>

☐ **(Mandated Change)** Per IRS requirements, updated the 1099 form/instructions and all 1099 functionality to support the 2020 tax year.

## Human Resources > Tables > Tax/Deductions > Income Tax

☐ Modified the **But less than** field to allow seven characters and to be automatically populated with 9,999,999 to accommodate the tax rates being changed to annual amounts.

## Human Resources > Maintenance > Calendar YTD Data > Calendar YTD

☐ **(Mandated Change)** Added the **FFCRA** (Families First Coronavirus Response Act) **Payments** section allowing users to view and modify year-to-date FFCRA payment amounts for the 2020 calendar year. This section includes the following:

- **EPSLA Regular** (Emergency Paid Sick Leave Act regular rate)
- **EPSLA Two-Thirds** (Emergency Paid Sick Leave Act two-thirds rate)
- **EFMLEA** (Emergency Family and Medical Leave Expansion Act)

You can either manually update the fields on the Calendar YTD page or use the new **Update Cal YTD** button on Human Resources > Utilities > FFCRA Payments page to update the fields.

**NOTE:** If any of these amounts are greater than zero, the field and amount are displayed in Box 14 on the employee's W-2.

Maintenance > Calendar YTD Data SessionTimer: 239 min and 53 sec

Save

Calendar Year: 2020 Employee: 000113 : BROWN, BILLY E Retrieve Direct

Calendar YTD Third Party Sick Pay W2 Inquiry

**Calendar YTD Data**

Contract Pay:	4,238.83	Withholding Tax:	13.00
Non-Contract Pay:	1.00	Medicare Gross:	4,238.83
Supplemental Pay:	2.00	Emp Medicare Tax:	61.46
TRS Supplemental:	3.00	FICA Gross:	14.00
Tax Emplr Ins Contr:	4.00	Emp FICA Tax:	15.00
Non-TRS Bus Allow:	5.00	457 Emplr Contr:	16.00
Non-TRS Reimbr Excess:	6.00	Emp Business Expense:	17.00
N-TRS N-Pay Bus Allow:	7.00	Earned Income Credit:	0.00
Tax Emplr Grp Ins Contr:	8.00	TRS Deposit:	353.94
457 Withdraw:	0.00	Non-TRS Reimbr Base:	18.00
Annuities:	9.00	Non-TRS Non-Tax Bus Allow:	19.00
Cafeteria 125:	10.00	N-TRS N-Tax N-Pay Allow:	20.00
TRS Salary Red:	326.39	Health Ins:	21.00
457 Emp Contr:	11.00	Unemployment Tax:	22.00
Emplr Depend Care Taxable:	12.00	Unemployment Gross:	4,238.83
Taxable Gross:	3,930.44	Taxed Fringe Benefits:	6.60
<a href="#">Refresh Taxable Gross</a>		Dependent Care:	24.00

**Unemployment Data**

	Gross	Tax
First Quarter:	4,238.83	
Second Quarter:	0.00	
Third Quarter:	0.00	
Fourth Quarter:	0.00	

Please select the pay date to be used for the

Preview

**FFCRA Payments**

EPSLA Regular:	40,000.00
EPSLA Two-Thirds:	40,000.01
EFMLEA:	40,000.02

## Human Resources > Utilities > FFCRA Payments

☐ **(Mandated Change)** Added the **Update Cal YTD** button to recalculate the FFCRA Payment amounts for processed pay dates where the leave transmittals still exist.

This utility can be used to update the FFCRA Payment amounts on the Human Resources > Maintenance > Calendar YTD Data > Calendar YTD for W-2 processing. Additional information can be found in Help.

Utilities > FFCRA Payments SessionTimer: 239 min and 55 sec

This utility will create Extra Duty Transmittals based on the criteria entered here in accordance with the Families First Coronavirus Response Act. Please review Help for detailed information.

Pay Date: -- -- -- -- Execute **Update Cal YTD**

## Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5100 - W-2 Forms

☐ (**Mandated Change**) Per IRS requirements, updated the W-2 form/instructions and all W-2 functionality to support the 2020 tax year.

## Purchasing > Inquiry > General Ledger Inquiry > General Ledger Inquiry

☐ Updated the default Retrieve function to only display active account codes. Also, added the **Include Inactive Accounts** check box to display the inactive account codes in the inquiry.

The screenshot shows the 'General Ledger Inquiry' screen. At the top, it says 'Inquiry > General Ledger Inquiry' and 'SessionTimer: 239 min and 56 sec'. Below the title bar, there are two tabs: 'General Ledger Inquiry' and 'General Ledger Account Summary'. Under the 'General Ledger Inquiry' tab, there are several checkboxes: 'Processed' (checked), 'Current Period: 04' (checked), 'Next Period: 05' (checked), 'Include soft encumbrances when POs exist' (checked), 'Exclude Objects 61XX' (unchecked), and 'Include Inactive Accounts' (unchecked, highlighted with a red circle). There is also a 'Show Details' checkbox (checked) with the text 'Report will display Transaction Details'. Below these, there is a 'Description' section with two radio buttons: 'Reason' (unchecked) and 'Vendor Name' (checked). At the bottom, there is a grid for account codes with columns for Fund, Func, Obj, Subj, Org, and Prog. The 'Retrieve' and 'Reset' buttons are at the bottom right.

## Warehouse > Inquiry > General Ledger Inquiry

☐ Updated the default Retrieve function to only display active account codes. Also, added the **Include Inactive Accounts** check box to display the inactive account codes in the inquiry.

The screenshot shows the 'General Ledger Inquiry' screen. At the top, it says 'Inquiry > General Ledger Inquiry' and 'SessionTimer: 239 min and 56 sec'. Below the title bar, there are two tabs: 'General Ledger Inquiry' and 'General Ledger Account Summary'. Under the 'General Ledger Inquiry' tab, there are several checkboxes: 'Processed' (checked), 'Current Period: 04' (checked), 'Next Period: 05' (checked), 'Include soft Encumbrances when POs exist' (checked), 'Exclude Objects 61XX' (unchecked), and 'Include Inactive Accounts' (unchecked, highlighted with a red circle). There is also a 'Show Details' checkbox (checked) with the text 'Report will display Transaction Details'. Below these, there is a 'Description' section with two radio buttons: 'Reason' (unchecked) and 'Vendor Name' (checked). At the bottom, there is a grid for account codes with columns for Fund, Func, Obj, Subj, Org, and Prog. The 'Retrieve' and 'Reset' buttons are at the bottom right.



## EmployeePortal

**Release Date:** 12/04/2020 **TxEIS/ASCENDER:** 3.5.0219 **EmployeePortal Update:** 4.0.1

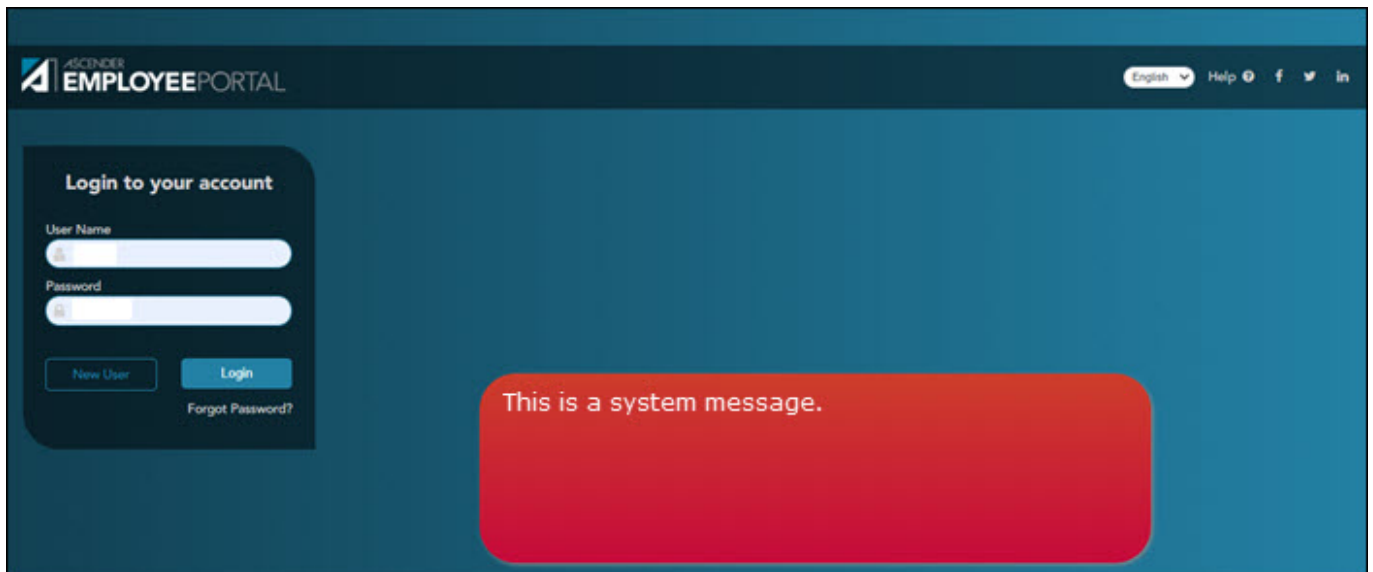
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## EmployeePortal

- ☐ Corrected the program to properly display the **Help** button in the lower right corner of each page in the application.
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### EmployeePortal > Login

- ☐ Added a system message section to the page.



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### EmployeePortal > Change Password

- ☐ Corrected the issue that prevented employees from changing their password if **Self-Service Demographic** was not selected in TxEIS.
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### EmployeePortal > Self-Service Profile

- ☐ Corrected the program to properly handle changes submitted by the employee when the **Alternate Address** option is set to *N* on the Human Resources > Tables > EA Self-Service Assignments > Demographic page. Previously, an “Oops” message was displayed.
  - ☐ Corrected the issue that allowed the **Filing Status** field to be left blank even though it was marked as a required field on the Human Resources > Tables > EA Self-Service Assignments > Payroll page.
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## EmployeePortal > Inquiry

☐ Added the following W-4 Withholding fields to the Calendar Year to Date, Current Pay Information, Deductions, and Earnings pages:

- **Filing Status**
  - **Multi-Jobs**
  - **Children under 17**
  - **Other Dependents**
  - **Other Exemptions**
  - **Other Income**
  - **Other Deductions**
- 

## EmployeePortal > Inquiry > Calendar Year to Date

☐ Corrected the program to display all active pay frequencies. Previously, if an employee was paid from multiple pay frequencies, only data from one of the pay frequencies was displayed.

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## EmployeePortal > Inquiry > Earnings

☐ Corrected the PDF to include complete bank, leave, and address information.

☐ Corrected the program to display the correct **Total Earnings** amount. Previously, if an employee had a Non-TRS Non-pay Taxable amount, that amount was doubled in the **Total Earnings** amount.

☐ Modified the User Interface colors and shading to meet ASCENDER style standards.

☐ Corrected the program to display the correct leave type and units used.

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## EmployeePortal > Inquiry > W-2 Information

☐ (**Mandated Change**) Per IRS requirements, updated the W-2 form/instructions and all W-2 functionality to support the 2020 tax year.

☐ (**Mandated Change**) Added the following fields for the 2020 calendar year:

- **EPSL1** (Emergency Paid Sick Leave Act (EPSLA) regular rate)
  - **EPSL2** (Emergency Paid Sick Leave Act (EPSLA) two-thirds rate)
  - **EFMLEA** (Emergency Family and Medical Leave Expansion Act)
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**NOTE:** If any of these amounts are greater than zero, the field and amount are displayed in Box 14 on the employee's W-2.

**W-2 Information**

**W-2 INFO MESSAGE**

Please select a calendar year: 2020

Taxable Gross Pay	1,426.77	Withholding Tax	143.98	Pension	Y
FICA Gross	0.00	FICA Tax	0.00		
Medicare Gross	0.00	Medicare Tax	0.00		
Earned Income Credit	0.00	Dependent Care	0.00		
Annuity Deduction	0.00	457 Withdraw	0.00	457 Annuities - Box 12	0.00
Cafeteria 125	216.94	Roth 403B After Tax	0.00		
Non-TRS Business Expense	0.00	Taxable Allowance	0.00	Emp Business Expense	0.00
Moving Expense Reimbursement	0.00	Emplr Sponsored Health Coverage	357.00	Annuity Roth 457b	0.00
TRS Salary Reduction	137.12				
Taxed Life Contribution	0.00	Health Insurance Deduction	0.00	Taxable Fringe Benefits	0.00
Health Savings Account	0.00	Non-Tax Sick Pay	0.00	HIRE Exempt Wages	0.00
EP5L1	0.00	EP5L2	0.00	EFMLEA	0.00

☐ Corrected the program to display the correct Medicare tax withholding values on the report when using the mouse right-click to print the page.

## EmployeePortal > Leave Requests

☐ Corrected the program to automatically populate the **End Date** field with the same date entered or selected in the **Start Date** field.

☐ Corrected the program to allow employees to edit or delete a submitted leave request at any point prior to the transmittal being created in payroll.

## EmployeePortal > Supervisor > Approve Leave Requests



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☐ Corrected the program to display the correct Absence Reason description as originally selected by the requestor.

#### Update 3.5.0217

**Release Date:** 11/17/20 **TxEIS/ASCENDER Update:** 3.5.0217

### Human Resources > Maintenance > Staff Demo > Responsibility

☐ Corrected the program to allow duplicate responsibility records with different **Grade Levels** to be saved.

#### Update 3.5.0206

**Release Date:** 10/2/2020 **TxEIS/ASCENDER Update:** 3.5.0206

### Accounts Receivable > Maintenance > Credit Memo

☐ Corrected the issue that caused the following error to occur when the Accounts Receivable, Current, and Next accounting periods in Finance were all the same: "Invalid accounting period for Accounts Receivable in Finance Options."

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### Finance > Maintenance > Postings > Journal Actual

☐ Corrected the issue that caused revenue and expenditure accounts to be out-of-balance when a journal voucher was deleted from this tab.

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### Human Resources > Maintenance > Staff Demo > Responsibility

☐ **(Mandated Change)** Added the **Grade Level** field. This field must be populated if the **Pop Served** field is set to 06 and the **Role ID** field is set to either 033, 047, or 087. Otherwise, the field should be left blank.

Rows: 1 of 1

Campus:	001 001 School	# of Students:	015	PE Info:			
Role ID:	033 - Educational Aide	Class ID:	001a-ut-0-0000000	Days Wk 1:	0	Min Wk 1:	0
Service ID:	01020000 - KINDER ELEM	Class Type:	01 Regular	Days Wk 2:	0	Min Wk 2:	0
Pop Served:	06 Special Ed Students	Monthly Minutes:	09000	Days Wk 3:	0	Min Wk 3:	0
Grade Level:	KG Kindergarten	ESC/SSA:	School District Employee	Days Wk 4:	0	Min Wk 4:	0
		Job Code:					

[Refresh Service ID Setting](#)

## Human Resources > Maintenance > Staff Job/Pay Data > Employment Info

☐ **(Mandated Change)** Added the **Paraprofessional Certification** check box allowing you to indicate whether a paraprofessional employee is certified.

Maintenance > Staff Job/Pay Data SessionTimer: 237 min and 18 sec

Save

Employee: 000113 : BROWN, BILLY E

Retrieve Directory Documents

Employment Info Pay Info Job Info Distributions Deductions Leave Balance

Employee Status:	1 Active professional	Original Emp. Date:	08-20-1990	Primary Job Code:	0145 - SPP TEACHER
Highest Degree:	2 Master's	Latest Re-Employ Date:	08-20-1990	Primary EEOC:	
Percent Day Employed:	100%	Retirement Date:	00-00-0000	Percent Assigned:	100%
Eligible for Re-hire:	<input type="checkbox"/>	Take Retiree Surcharge:	<input type="checkbox"/>	Employment Type:	F Half-Time or more
Extract ID:	SEP 10 MONTH EMPLOYEES	NY Take Retiree Surcharge:	<input type="checkbox"/>	Retiree Employment Type:	
W-2 Elec Consent:	N No	Year Round:	<input type="checkbox"/>	PEIMS Auxiliary Role ID:	
1095 Elec Consent:		ERS Retiree Health Elig:	<input type="checkbox"/>	Highly Qualified:	<input type="checkbox"/>
		NY ERS Retiree Health Elig:	<input type="checkbox"/>	Paraprofessional Certification:	<input type="checkbox"/>

## Human Resources > Reports > HR Reports > Personnel Reports > HRS1250 - Employee Data Listing

☐ **(Mandated Change)** Added the **Paraprofessional Certification** check box to the **Personnel Information** section.

Date Run: 09-29-2020 11:12 AM  
 Cnty Dist: Employee Data Listing  
 ISD Program: HRS1250  
 Page: 1 of 2  
 Frequency: 6

Emp Nbr: 000113 Emp Name: BROWN, BILLY E

Payroll Name & Primary Address		Former Name & Alternate Address		Primary Campus: 700 - 700 School	
Last: BROWN		Last: BROWN		Payroll Campus: 700 - 700 School	
First: BILLY		First: BILLIE		Info Restrict: N	Gender: M - Male
Middle: E		Middle: EDITH		Restrict Public: A	Marital Stat: M - Married
Title: Gen:		Title: Mis Gen: II		Local Area 1: TEACHER	Birth Date: 07-13-1962
Street: BOX 2349		Street: 4242 S PHELPS		Local Area 2:	Last Chg: 08-15-2019
City/St: Alamo City, TX		City/St: Alamo City, TX		Drivers Lic#: 64632218	TX
Zip Cd: 46119		Zip Cd: 46119		DL Expir Date:	Deceased: N
Country:				TRS Beg. Dt:	
Phone: (555) 675-8350	Cell: (555) 310-9141	Bus Ph: ( )	Bus Ext:		Citizen: Y
Wk E-mail:		Hm E-mail:		Hispanic/Latino <input type="checkbox"/>	Black/African American <input type="checkbox"/>
Supplemental Address:				Asian <input type="checkbox"/>	American Indian/Alaskan Native <input type="checkbox"/>
Country:				White <input checked="" type="checkbox"/>	Native Hawaiian/Other Pacific Isl <input type="checkbox"/>
Delivery Name:				Bilingual:	
Emergency Contact: CHN Y		Relation: SPOUSE			
Phone: (555) 310-9140	Ext:				
Emergency Notes:					

**Personnel Information**

Employee Status: 1 - Active professional	Original Emp. Date: 08-20-1990	Primary Job Code: 0145 - SPP TEACHER
Highest Degree: 2 - Master's	Latest Reemploy Date: 08-20-1990	Primary EEOC:
Percent Day Employed: 100%	Retirement Date:	Percent 100%
Eligible for Rehire: <input checked="" type="checkbox"/>	Take Retiree Surcharge: <input type="checkbox"/>	Assign: <input type="checkbox"/>
Extract ID: SEP - 10 MONTH	NY Take Retiree Surcharge: <input type="checkbox"/>	Paraprofessional Certification: <input type="checkbox"/>
W-2 Elec Consent: N	Year Round: <input type="checkbox"/>	Employment Type: F - Half-Time or more
1095 Elec Consent:	ERS Retiree Health Elig: <input type="checkbox"/>	Retiree Employment Type:
		NY ERS Retiree Health Plan: <input type="checkbox"/>

☐ (Mandated Change) Added the **Grd Lvl** column to the **Staff Responsibilities** section.

Payroll Name & Primary Address		Former Name & Alternate Address		Primary Campus: 700 - 700 School	
Last: BROWN		Last: BROWN		Payroll Campus: 700 - 700 School	
First: BILLY		First: BILLIE		Info Restrict: N	Gender: M - Male
Middle: E		Middle: EDITH		Restrict Public: A	Marital Stat: M - Married
Title: Gen:		Title: Mis Gen: II		Local Area 1: TEACHER	Birth Date: 07-13-1962
Street: BOX 2349		Street: 4242 S PHELPS		Local Area 2:	Last Chg: 08-15-2019
City/St: Alamo City, TX		City/St: Alamo City, TX		Drivers Lic#: 64632218	TX
Zip Cd: 46119		Zip Cd: 46119		DL Expir Date:	Deceased: N
Country:				TRS Beg. Dt:	
Phone: (555) 675-8350	Cell: (555) 310-9141	Bus Ph: ( )	Bus Ext:		Citizen: Y
Wk E-mail:		Hm E-mail:		Hispanic/Latino <input type="checkbox"/>	Black/African American <input type="checkbox"/>
Supplemental Address:				Asian <input type="checkbox"/>	American Indian/Alaskan Native <input type="checkbox"/>
Country:				White <input checked="" type="checkbox"/>	Native Hawaiian/Other Pacific Isl <input type="checkbox"/>
Delivery Name:				Bilingual:	
Emergency Contact: CHN Y		Relation: SPOUSE			
Phone: (555) 310-9140	Ext:				
Emergency Notes:					

**Staff Responsibilities**

Campus	Role ID	Service ID	Service ID Descr	Pop Snd	Grd Lvl	Nbr Stu	Class ID	Class Type	Monthly Minutes	ESC / SSA	Job Code
001 - 001 School	PE Info:	114 SS003000	SCHL ADMIN - NONE	01		015	001aut00000000	01	09000		

End of Report

## Human Resources > Reports > User Created Reports > HR Report

☐ (Mandated Change) Added the **Grade Level** check box to the **Responsibility** section.

☐ **(Mandated Change)** Added the **Paraprofessional Certification** check box to the **Employment** section.

The screenshot displays a web-based form for employee data entry. It is organized into three main sections: Employee Demographic, Certification, and Employment. The 'Employee Demographic' section contains numerous checkboxes for personal and contact information. The 'Certification' section includes checkboxes for various roles and levels, with 'Grade Level' circled in red. The 'Employment' section contains checkboxes for employment status, experience, and dates, with 'Paraprofessional Certification' circled in red.

Update 3.5.0204

**Release Date: 9/25/20 TxEIS/ASCENDER Update: 3.5.0204**

## Finance

**Finance > Maintenance > Postings > Journal Budget**

**Finance > Maintenance > Postings > Journal Actual**

☐ Corrected the program to properly retrieve the continuing funds journal entry created by the Fiscal Year Close process on the Journal Budget tab instead of the Journal Actual tab.

**Finance > Maintenance > Postings > Journal Actual**

☐ Modified the program to allow the deletion of TRS On-Behalf journal entries. Now, a trashcan icon is displayed for these entries.

**Finance > Utilities > Fiscal Year Processing > Create New Accounts By Fund**

☐ Corrected the error that occurred during processing, which was caused by the system trying to re-create duplicate accounts.

- 
- ☐ Corrected the issue that prevented the preview report from being generated.

### Update 3.5.0190 Finance

Update 3.5.0190 Finance

#### **Finance > Maintenance > Postings > Purchase Order**

- ☐ Corrected the program to allow reversing a PO created in Finance. Previously, an error was displayed.

### Update 3.5.0190

Update 3.5.0190

## **Finance**

#### **Finance > Maintenance > Postings > Purchase Order**

- ☐ Corrected the issue that prevented purchase orders with balances from being retrieved.

#### **Finance > Utilities > Fiscal Year Close**

- ☐ Modified the program to only enable this menu item when logged on to file ID C.
- ☐ Corrected the purchase order re-encumbrance for continuing funds to include encumbrance adjustments and liquidation adjustments from check/credit card transactions.
- ☐ Corrected the program to not re-encumber outstanding purchase orders that are split between funds.
- ☐ Modified the program validation to ignore all payrolls that have not been interfaced where the payroll is in the same month as the LEA's **Starting Accounting Period** on the District Finance Options tab.

#### **Finance > Utilities > Fiscal Year Processing > Create New Accounts By Fund**

- ☐ Corrected the program to properly post the journal voucher entries. Now, the closing entries will post separately to the budget and actual fund balance object codes that are listed in the account code table.

[Update 3.5.0182](#)

Update 3.5.0182

## Grants and Projects

### Grants and Projects > Reports

☐ Removed this menu option as it is not currently available. Previously, the menu displayed the Bank Reconciliation Reports, which resulted in a program error if selected.

## Finance

### Finance > Utilities > Fiscal Year Close

☐ Corrected the program error that occurred when you accessed the page. This issue was caused when the total number of funds in the file ID was a multiple of 15. For example, 15, 30, 45, 60 caused an issue but 18 did not even though the first page had the maximum.

[Update 3.5.0181](#)

Update 3.5.0181

## Grants and Projects

The Grants and Projects is a new application that allows you to view grant/project data for the entire grant period regardless of the fiscal year. The application includes the following pages:

### Grants and Projects > Tables > Grants and Projects Table

☐ Added this page to define grant codes that can be tracked in the Grants and Projects application.

### Grants and Projects > Inquiry > GL Inquiry

☐ Added this page to perform the general ledger inquiries for a specific grant/project code.

## District Administration

### District Administration > Maintenance > User Profiles > Grants and Projects

☐ Added this tab to assign specific grant code(s) to users allowing them to view the grant code details in the Grants and Projects application.

## Finance

### Finance > Maintenance > Postings > Journal Budget & Journal Actual

☐ Added the **Ignore for Grants and Projects** check box allowing you to indicate that all entries for the JV should be ignored for the Grants and Projects application. For example, a user can post a JV in a file ID and it will not be displayed in the Grants and Projects inquiry. This can be helpful with auditor's entries.

### Finance > Maintenance > Fiscal Year Close

☐ Corrected the issue that allowed a single fund with multiple years separated between pages to be incremented instead of being defaulted to only allow the fund to be continued. For example, if fund 616/8 was listed on one page and 616/9 was listed on the next page, the **Increment** option should not be available for 616/8.

☐ Corrected the issue with possible out-of-balance issues stemming from running the closing process. Now, the Finance > Utilities > Out of Balance Correction utility is processed prior to processing any of the Fiscal Year Close functions.

☐ Corrected the issue that prevented report headers from being displayed if there was nothing to report on the Fiscal Year Close pre-post Unprocessed Budget Amendment report; only a blank page was displayed.

☐ Corrected the pre-post JV report to retrieve the Finance end-of-year stored procedure to accurately generate the opening entries.

☐ Modified the program to identify the purchase order encumbrances created for rollover funds in order to prevent them from being displayed multiple times in the Grants and Projects inquiry.

#### [Update 3.5.0180](#)

Update 3.5.0180

## Human Resources

### Human Resources > Maintenance > Staff Demo

☐ Corrected the Document Attachments issue that prevented the **Driver License** option from being displayed in the Document Upload Type drop-down list.

#### [Update 3.5.0178](#)



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Update 3.5.0178

## Finance

### Finance > Maintenance > Postings > Check Processing-PA

☐ Corrected the issue that prevented you from adding a new purchase authorization (PA) after one was already added and saved.

[Update 3.5.0177](#)

Update 3.5.0177

## Known Issues

These issues are a high priority and will be corrected as quickly as possible.

### Finance > Utilities > Fiscal Year Close

- ☐ The Fiscal Year Close process may cause an out-of-balance in file ID C. **Workaround:** Run the Finance > Utilities > Out of Balance Correction utility to correct it.
- ☐ The Fiscal Year Close pre-post JV report is incorrect.
- ☐ If there is nothing to report on the Fiscal Year Close pre-post Unprocessed Budget Amendment report, the report headers are not displayed.

---

## Finance

### Finance > Maintenance > Check Processing > Print Checks

- ☐ Corrected the error that occurred when trying to post a vendor check.

### Finance > Maintenance > Postings > Journal Budget & Journal Actual



Maintenance > Postings SessionTimer: 239 min and 49 sec

Save

Journal Budget Journal Inquiry Purchase Order Cash Receipt Credit Memo Check Processing - PA Check Processing - PO Journal Actual

JV Number: 007344 JV Number Description: TECH SUPPLIES Retrieve Directory

JV Type: JV Number: JV Number Description: Acct Per: Capture Orig Budget: Default JV Number Description:

BUDGET 007344 TECH SUPPLIES 04

Add JV Reset Reverse JV Delete Print

Delete	Detail	Reverse	Account Code	Description	Reason	Debit Amount	Credit Amount	Trans Date	User ID
		<a href="#">Reverse</a>	199-11-6321.00-041-811000	TEXTBOOKS, M.S.	TECH SUPPLIES	50.00	0.00	04-04-2018	PAMELA
		<a href="#">Reverse</a>	199-11-6399.01-041-811000	TECH SUPPLIES	TECH SUPPLIES	0.00	50.00	04-04-2018	PAMELA
Totals:						50.00	50.00		

- ☐ Added the **Print** button to print the journal voucher report.
- ☐ Added the trashcan icon to delete previously saved individual journal voucher transactions. These deletions will be included in the Audit Log Inquiry.
- ☐ Replaced the **Delete JV** button with the **Delete** button to delete journal vouchers.
- ☐ Added the **Reset** button to clear unsaved data from the page.

## Finance > Maintenance > Postings > Check Processing - PA

Maintenance > Postings SessionTimer: 239 min and 52 sec

Save

Journal Budget Journal Inquiry Purchase Order Cash Receipt Credit Memo Check Processing - PA Check Processing - PO Journal Actual

PA Number: 181881 Vendor Number: 39689 Retrieve Directory ☒ View Account Details

PA Number: Sort Key / Vendor Name: Vendor Number:  
181881 WELLS FARGO VISA / WELLS FARGO VISA 39689

Add PA Reset Reverse PA Delete

Delete	Detail	Reverse	Proc	Acct Per	Account Code	Type	Check Nbr	Check Date	Reason	Net Expend Amt	Invoice Date	Invoice Nbr	Con
		<a href="#">Reverse</a>	<input type="checkbox"/>	04	180-00-2110.00-000-800000	District	915111	06-05-2018	District	11.11	06-06-2018	060618	180-00-
		<a href="#">Reverse</a>	<input type="checkbox"/>	04	180-00-2110.22-000-800000	Computer		--	PYMT WELLS FARGO VISA	1,448.00	--		180-00-
		<a href="#">Reverse</a>	<input type="checkbox"/>	04	180-00-2110.22-000-800000	Computer		--	Test	12.12	06-09-2018	654654	180-00-
Totals:										1,471.23			

- ☐ Added the trashcan icon to delete previously saved individual purchase authorization transactions. These deletions will be included in the Audit Log Inquiry.
- ☐ Replaced the **Delete PA** button with the **Delete** button to delete purchase authorizations.
- ☐ Added the **Reset** button to clear unsaved data from the page.

## Finance > Inquiry > Vendor Inquiry > Vendor Payment Inquiry

- ☐ Corrected the issue that prevented attached documents from being displayed.

## Finance > Utilities > Move Current to New File ID

- ☐ Changed this utility to no longer function in the current file ID (file ID C).

## Finance > Utilities > Fiscal Year Processing > Delete Funds

- ☐ Changed this utility to no longer function in the current file ID (file ID C).

## Finance > Utilities > Fiscal Year Close

- ☐ Added this utility to provide an easy, streamlined method to efficiently end the old fiscal year and begin the new fiscal year. Review the Fiscal Year Close Help page for additional information.

- ☐ Removed the following utilities as they are included in the new Fiscal Year Close process and no longer necessary as stand-alone functions.

- Finance > Budget Amendment > Delete Amendments > Fund/Fiscal Year
- Finance > Utilities > Mass Change Account Codes > Fund/Year
- Finance > Utilities > Fiscal Year Processing > Fund Close (5XXX-8XXX)
- Finance > Utilities > Fiscal Year Processing > Fund Close (1XXX-4XXX)

- ☐ Removed the export (backup) prompt from the following utilities:

- Finance > Maintenance > EFT Processing > Create EFT File
- Finance > Budget Amendment > Post to General Ledger
- Finance > Budget Amendment > Delete Amendments > Amendment Number
- Finance > Utilities > End of Month Closing
- Finance > Utilities > Fiscal Year Processing > Create New Accounts by Fund
- Finance > Utilities > Fiscal Year Processing > Mass Delete Credit Memos
- Finance > Utilities > Mass Purchase Order Reversal
- Finance > Utilities > Fiscal Year Processing > Move Budget To Finance
- Finance > Utilities > Fiscal Year Processing > Clear/Move NYR Requisitions to CYR
- Finance > Utilities > Mass Change Account Codes > Mask Crosswalk
- Finance > Utilities > Fiscal Year Processing > Mass Delete Vendors
- Finance > Utilities > Import JV Transactions

Update 3.5.0176

Update 3.5.0176

## Human Resources

### Human Resources > Utilities > FFCRA Payments

☐ Added this utility to track and calculate Families First Coronavirus Response (FFCRA) payments by creating extra duty transmittals based on the entered criteria. Review the FFCRA Payments Help page for additional information.

Update 3.5.0174

Update 3.5.0174

☐ Removed the **What's HOT in TxEIS** button from the Login Page as the newsletter is obsolete.

## Accounts Receivable

### Accounts Receivable > Maintenance > Credit Memo

☐ Modified the program to correctly handle credit memos when the accounting period is the same as the next accounting period in Finance. Previously, when trying to apply a credit memo to an invoice, a credit memo error was displayed and an out-of-balance condition occurred in Finance. Now, the credit memo is correctly applied to the invoice and an overpayment is created if the credit memo caused a negative balance.

### Accounts Receivable > Reports > Accounts Receivable Reports > BAR7500 - Reprint Invoices Report

☐ Modified the program to allow prior year account codes to be printed even if they do not exist in the current year Finance chart of accounts.

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## Human Resources

### Human Resources > Utilities > Mass Update > Salary Calculation

- ☐ Corrected the issue that prevented the daily rate and accrual rate from being updated when performing salary calculations using the local annual concept.
- 



## CareerPortal

Update 4.0.0.31 (TxEIS 3.5.0174)

### CareerPortal Login

- ☐ Added **Help** before the question mark icon.
  - ☐ Added Facebook, Twitter, and LinkedIn icons with links after the **Help** link.
- 



## EmployeePortal

Update 4.0.0.75 (TxEIS 3.5.0174)

### EmployeePortal Login

- ☐ Changed the login statement from Please Login to Login to Your Account.
- ☐ Added Facebook, Twitter, and LinkedIn icons with links after the **Help** link.
- ☐ Removed the Contact Us link.

[Update 3.5.0172](#)

Update 3.5.0172

## Finance

### Finance > Maintenance > Check Processing > Void Check

☐ Corrected the issue that prevented PO encumbrance transactions from being posted to the logged-on accounting period.

### Finance > Inquiry > Vendor Inquiry > Vendor Payment Inquiry

☐ Corrected the Document Attachments issue that caused a delay in retrieving data on the page.

[Update 3.5.0171](#)

Update 3.5.0171

## Finance

### Finance > Maintenance > Check Processing > Void Check

☐ Corrected the issue that prevented deferred checks from being reposted with the original check transaction account codes.

## Human Resources

☐ Updated the state minimum salary calculations to allow TRS Position Codes 02 and 05 to be based on days greater than 187.

☐ Corrected the state minimum salary calculation to use the **# of Days Empld** instead of the **Max Days**.

- Human Resources > Maintenance > Staff Job/Pay Data > Job Info
- Human Resources > Maintenance > PMIS Position Admin
- Human Resources > Maintenance > PMIS Position Modify
- Human Resources > Utilities > PMIS > Salary Simulation
- Human Resources > Utilities > PMIS > Move Forecast to CYR Position and Payroll
- Human Resources > Utilities > PMIS > Move Forecast to NYR Payroll

### Human Resources > Maintenance > PMIS Change In Position > Change In Compensation

☐ Corrected the contract and pay rate amount calculations for pay type 2 employees who are paid with the hourly/daily pay concept at an hourly rate.

---

**Human Resources > Payroll Processing > Run Payroll**

☐ Corrected the issue that caused the federal income tax to be calculated even though the employee was marked as tax exempt and had zero original exemptions and no selections in the new W-4 fields.

**Human Resources > Utilities > PMIS**

☐ Updated the following utilities to verify the job code salary concept and display any failures on the error report.

- Move Forecast to CYR Position and Payroll
- Move Forecast to CYR Position and Payroll
- Create Forecast Positions

**Human Resources > Utilities > PMIS > Move Forecast to CYR Position and Payroll**

☐ Corrected the issue that caused an error when updating current year records.

**Human Resources > Reports > TRS Reports > HRS7815 - TRS Non-OASDI Employer Contribution & HRS8905 - Regular Payroll (RP)**

☐ Corrected the issue that caused the TRS Non-OASDI amount to be doubled when performance pay was included.

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## EmployeePortal

Update 4.0.0.137 (TxEIS 3.5.0171)

**EmployeePortal > Forgot Password**

☐ Corrected the issue that caused users to receive an error message. This issue only occurred if the LEA selected to use the Social Security Number on the Human Resources > Tables > District EA Options > Employee Access Options tab.

**EmployeePortal > Inquiry > W-2 Information**

☐ Corrected the issue that prevented the **Print** button from being displayed.

☐ Corrected the issue that prevented the third-party sick pay from being displayed. Also, corrected the third-party sick pay label.

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**EmployeePortal > Inquiry > 1095 Information**

- ☐ Corrected the issue that prevented the **Print** button from being displayed.

**EmployeePortal > Leave Balances**

- ☐ Corrected the issue that caused this tab to be enabled for employees in EmployeePortal even though it was not enabled on the Human Resources > Tables > District EA Options > Employee Access Options tab.

**EmployeePortal > Leave Requests**

- ☐ Corrected the issue that prevented leave from being posted to a leave type with a zero balance even if the **Post Against Zero Balance** option was selected for the leave type.
- ☐ Modified the program to display all of the employee's active assigned leave types even if the leave type amount is zero.

[Update 3.5.0170](#)

Update 3.5.0170

## Human Resources

**Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5100 - W-2 Forms**

- ☐ Corrected the issue that caused the employee's full name (first, middle, and last) to be printed in the Employee's First Name box on Copy A (red form) of the W-2 form.



## EmployeePortal

Update 4.0.0.127 (TxEIS 3.5.0170)

**EmployeePortal > Self-Service**

- ☐ Corrected the W-4 data displayed under **W4 Marital Status Information**.

**EmployeePortal > Inquiry > W-2 Information**

- 
- ☐ Corrected the issue that prevented the W-2 Electronic Consent selection from being saved if the employee did not have W-2 historical data.
  - ☐ Corrected the issue that prevented Box 12 Code E (annuity amount) from being displayed properly.

### **EmployeePortal > Inquiry > 1095 Information**

- ☐ Corrected the issue that prevented the 1095 Electronic Consent selection from being saved if the employee did not have 1095 historical data.

### **EmployeePortal > Inquiry > Current Pay Information**

- ☐ Corrected the issue that prevented the current pay information from being displayed if the employee had data in multiple pay frequencies.
- ☐ Corrected the issue that prevented the campus name from being displayed.

### [Update 3.5.0169](#)

Update 3.5.0169

## **Human Resources**

### **Human Resources > Maintenance > Staff Job/Pay Data > Pay Info**

- ☐ Corrected the issue that caused a W-4 Marital Status code validation error to occur when trying to add W-4 information for a new employee.

### **Human Resources > Payroll Processing > Special Adjustments > Percent**

- ☐ Corrected the issue that caused an error to occur when trying to process a Special Adjustment.



## **EmployeePortal**

- ☐ Corrected the issue that prevented news users from being created in some databases.

### **EmployeePortal > Forgot Password**



- 
- ☐ Corrected the issue that prevented the Forgot Password functionality from reading the email server information for each database.

### Update 3.5.0168

Update 3.5.0168

## EmployeePortal

### EmployeePortal > Self-Service

- ☐ Corrected the issue that prevented the employee from adding a new direct deposit account.

### EmployeePortal > Inquiry > Earnings

- ☐ Corrected the wage and earnings reporting per pay date for Business only districts.
- ☐ Corrected the issue that prevented the employee from printing their current earnings if they were paid with a physical payroll check instead of an EFT.

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## Human Resources

### Human Resources > Utilities > Payroll Accrual Variance Report > Post to Master/Interface to Finance

- ☐ Corrected the issue that caused a program error to occur when trying to run this utility.

### Release 3.5

## New ASCENDER Products

The TCC is excited to announce the launch of the new ASCENDER CareerPortal and EmployeePortal applications! Check out the ASCENDER Resources page for training guides and marketing materials.

## CareerPortal

The CareerPortal application uses the new ASCENDER user interface (UI) and it is now included.

- ☐ **New URL:** <https://yourdomain.com/CareerPortal/home?distid=CCDDDD>

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**Example:** <https://ascendertx.com/CareerPortal/home?distid=009010>

Default login information:

- Username: madmin
- Password: D3faultPassword

## EmployeePortal

The EmployeePortal application uses the new ASCENDER user interface (UI), offers a Spanish language translation, and has a new calendar view for Leave Requests.

☐ **New URL:** <https://yourdomain.com/EmployeePortal/login?distid=CCDDDD>

**Example:** <https://ascendertx.com/EmployeePortal/login?distid=009010>

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## District Administration

### District Administration > Tables > Electronic Signatures

☐ Corrected the issue that caused an error to occur when trying to upload a signature on a new database.

## Bank Reconciliation

### Bank Reconciliation > Maintenance > Bank Transactions > Create Transactions

☐ Corrected the program to extract the original and voided check transactions even if the original and voided check transactions have the same date.

☐ Corrected the program to extract JV entries for credit card transactions.

## Finance

### Finance > Maintenance > Pending Payables

☐ Renamed the **Submit** button to **Submit/Return**. The functionality is the same as the original **Submit** button. After completing the required fields and then clicking **Submit/Return**, the check transaction is created, the pending payable transaction is deleted and you are returned to the main page.

☐ Added the **Submit/Stay** button. This functionality does not delete the pending payable transaction but instead adds a submit date to the record and you remain on the same page (PO details page). The Document Attachment functionality becomes available and the **Inv Documents** button is displayed allowing you to upload documents. The Document Attachments functionality is not available for bundled requisitions.

Maintenance > Pending Payables SessionTimer: 239 min and 19 sec

Buttons: **Submit/Return** (circled), **Submit/Stay** (circled), Cancel, Delete

Type & Number: PURCHASE ORDER 181979 Whse Cd: 0 Purchasing Received Date: 11-20-2019 Original Amount: 300.50  
 Vendor: 95000 123 EZ TEES INC Received Amount: 49.75 Balance Amount: 0.00  
 Received By: [Empty Field]

Maintenance > Pending Payables SessionTimer: 239 min and 58 sec

Buttons: Submit/Return, Submit/Stay, Cancel, Delete, **Inv Documents** (circled)

Transaction Successful

Type & Number: PURCHASE ORDER 181993 Whse Cd: 0 Purchasing Received Date: 09-13-2019 Original Amount: 375.00  
 Vendor: 95000 123 EZ TEES INC Received Amount: 50.00 Balance Amount: 375.00  
 Received By: [Empty Field]  
 Originator: [Empty Field]

☐ Added the read-only Document Attachments functionality for requisition documents if a purchase order has documents attached. The read-only Document Attachments functionality is not available for bundled requisitions.

Maintenance > Pending Payables SessionTimer: 239 min and 27 sec

Buttons: Submit/Return, Submit/Stay, Cancel, Delete, **Req Documents** (circled)

Type & Number: **PURCHASE ORDER 181963** (circled) Whse Cd: 0 Purchasing Received Date: 12-03-2019 Original Amount: 435.00  
 Vendor: 39461 AMERICAN BOTTLING COMPANY Received Amount: 155.00 Balance Amount: 435.00  
 46 BRAUNER PKWY, Alamo City, TX  
 54887 Received By: [Empty Field]  
 Originator: [Empty Field]

☐ Modified the program to allow this page to handle bundled requisitions/purchase orders.

☐ Corrected the issue that prevented posting in the Next accounting period.

### Finance > Maintenance > Check Processing > Print Checks

☐ Changed the Vendor Check Transaction Detail Report to sort by the invoice number and then account code when the invoice number is the same.

### Finance > Utilities > Move Current to New File ID

☐ Modified the program to prevent a fund from being moved or copied if a pending payable record is

tied to it.

### Finance > Utilities > Mass Change Account Codes > Mask Crosswalk

☐ Modified the program to include the pending payable distribution table when crosswalking from one account code to another.

### Finance > Utilities > Fiscal Year Processing > Fund Close 5XXX-8XXX and Fund Close 1XXX-4XXX

☐ Modified the program to prevent a fund from being deleted or closed if a pending payable record is tied to it.

### Finance > Reports > Finance Reports > Journals, Checks, Detail Ledgers > FIN1750 - Year to Date Check Payments List

☐ Corrected the published report to sort data according to the sort option selected in the **Sort by Ck#/Acct (1), Acct/Ck# (2), Vendor#/Ck#/Acct (3), Vendor#/Acct/Ck# (4)** parameter.

### Finance > Reports > Finance Reports > Vendor/Purchase Order Reports > FIN2100 - Printing 1099-MISC Form

☐ Per IRS requirements, updated the 1099-MISC Forms to support the 2019 tax year.

☐ Changed the **Print 1099 Form only (1), 1099 form including 1099 file (2), Non-preprinted Copy B (B) or Copy C (C)** parameter to **Print 1099 Form only (1), 1099 form including 1099 file (2), Non-preprinted Copy B and C (3)**. Option 3 prints Copies B and C on one page for the same vendor and includes the instructions for both copies on the back of the page.

Reports > Finance Reports > Vendor/Purchase Order Reports > Printing 1099-MISC Form SessionTimer: 239 min and 52 sec

[Return to Reports](#)

Report ID: FIN2100  
File ID: C  
User ID:  
Curr Per:  
Next Per:

Parameter Description	Value
Sort by Alpha (A), EIN/SSN (N), Zip Code (Z)	<input type="text"/>
Print 1099 Form only (1), 1099 form including 1099 file (2), Non-preprinted Copy B and C (3)	<input type="text"/>
Tax Year (####)	<input type="text"/>
Control Name (4 char, only required for 1099 file)	<input type="text"/>
Contact Name (40 char, only required for 1099 file)	<input type="text"/>
Control Code (5 char for 1099 file)	<input type="text"/>
Select Vendor(s), or blank for ALL	<input type="text"/> <a href="#">...</a>

[Run Preview](#)  
[Clear Options](#)

# Human Resources

☐ Per IRS requirements, added the new [W-4 fields](#) to the following pages/reports:

Be sure to review [Publication 15-T](#), which contains the withholding tax calculations.

- Human Resources > Tables > EA Self-Service Assignments > Payroll
- Human Resources > Next Year > Copy CYR Staff to NYR
- Human Resources > Next Year > Copy NYR Staff to CYR
- Human Resources > Self-Service > Payroll Approval
- Human Resources > Self-Service > Payroll Approval by Alternate
- Human Resources > Reports > HR Reports > Payroll Reports > HRS2500 - Wage and Earning Statement
- Human Resources > Reports > HR Reports > Payroll Information Reports > HRS1250 - Employee Data Listing
- Human Resources > Reports > HR Reports > Payroll Information Reports > HRS1650 - Employee Salary Information
- Human Resources > Reports > Payroll Reports > HRS2200 - Payroll Earnings Register
- Human Resources > Reports > YTD Reports > HRS3200 - YTD Payroll Earnings Register
- Human Resources > Reports > YTD Reports > HRS3500 - YTD Wage and Earnings Statement
- Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6150 - Employee Payroll Listing
- Human Resources > Reports > Self-Service Reports > HRS8000 - Self-Service Requests

☐ Removed the withholding status and exemptions from payroll check forms:

- Human Resources > Payroll Processing > Run Payroll > Print Checks
- Human Resources > Inquiry > Payroll Inquiry

☐ Per IRS requirements, updated the 1095-B/1095-C forms and all ACA functionality to support the 2019 tax year.

- Human Resources > Utilities > ACA 1094/1095 Correction/Replacement > 1094/1095-B
- Human Resources > Utilities > ACA 1094/1095 Correction/Replacement > 1094/1095-C
- Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5250 - 1095-B Forms
- Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5255 - 1095-C Forms

## Human Resources > Tables > District Options

☐ Added the **W-2 Print Options** section allowing you to select the amounts to be printed on the employee W-2 form. The following options are available:

- **TRS**
- **HLTH**
- **CAF**
- **NTA**

- TXA
- TFB

Tables > District HR Options SessionTimer: 239 min and 42 sec

**Save**

HR Options

**Retrieve** **Print**

TRS District ID:	<input type="text" value="3885"/>	Calculate Accrual Salaries:	<input checked="" type="checkbox"/>
Federal ID Number (EIN):	<input type="text" value="51-9128683"/>	Check Amount - Alpha:	<input checked="" type="checkbox"/>
Payroll Clearing Fund/Year:	<input type="text" value="863/8"/>	Summarize Benefits Interface:	<input type="checkbox"/>
TWC District ID:	<input type="text" value="699939322"/>	Supplemental Tax Rate:	<input type="text" value="25.00%"/>
Use Direct Deposit (Y,N, or C):	<input type="text" value="E - Electronic Funds Transfer"/>	Standard Hours per Workday:	<input type="text" value="8.0"/>
TRS Cost Education Index:	<input type="text" value="1.0800"/>	Max Gross Amt for District:	<input type="text" value="25,000.00"/>
Distributions Built By Amt. or %:	<input type="text" value="A - Amount"/>	Auto Assign Employee Number:	<input checked="" type="checkbox"/>
Apply Leave Used or Earned First:	<input type="text" value="E - Earned First"/>	Next Available Employee Number:	<input type="text" value="001161"/>
Leave Code for State Sick:	<input type="text" value="07 STATE SICK"/>	School Year for PEIMS Codes:	<input type="text" value="2018"/>
Leave Code for State Personal:	<input type="text" value="08 STATE PERSON"/>	Use Emp Nbr or SSN in EFT File:	<input type="text" value="S - Social Security Nbr"/>
Update Actual Hours From Payroll Processing:	<input checked="" type="checkbox"/>	Set Demo Alpha Fields to Uppercase:	<input type="checkbox"/>

**Automatically Compute**

Pay Rate: ☐

Daily Rate: ☐

Dock Rate: ☐

Accrual Rate: ☐

Overtime Rate: ☒

**W-2 Print Options**

TRS: ☒

HLTH: ☒

CAF: ☒

NTA: ☒

TXA: ☒

TFB: ☒

**Default Overtime Object Code**

Professional:

Para-Professional/Hourly:

Other:

## Human Resources > Tables > Tax/Deductions > Exemptions

☐ Per IRS requirements, exemptions will no longer be used as of the 2020 calendar year. As a result, all data fields were removed from this tab for calendar years greater than 2019 and the following message is displayed: Exemption data is no longer valid.

Tables > Tax/Deductions SessionTimer: 239 min and 57 sec

**Save**

Calendar Year:  **Retrieve** **Delete**

**Exemptions** **Income Tax** **FICA Tax** **Unemployment** **TRS Rates** **457 Def Comp** **Workers' Comp** **Deduction Cd**

**Print**

Exemption data is no longer valid.

## Human Resources > Tables > Tax/Deductions > Income Tax

Per IRS requirements, modified this tab to accommodate the income tax guidelines for calendar years greater than 2019.

☐ For tax years less than or equal to 2019, the original data fields are displayed (except for the table column headers, which changed per IRS documentation) and data is saved per marital status and per pay frequency.

☐ For tax years greater than or equal to 2020, the new data fields are displayed and data is saved per the following guidelines:


The pay frequency for these rate tables will be empty as the rate tables are now stored as annual amounts. When payroll calculations are processed, the rates will be divided by 26, 24 and 12 for each of the respective pay frequencies (4, 5, and 6).

- A - Standard / Married filing jointly
- B - Standard / Single or Married filing separately
- C - Standard / Head of household
- D - Higher / Married filing jointly
- E - Higher / Single or Married filing separately
- F - Higher / Head of household

Codes G, H, and I are used for individual exemption or credit amounts:

- G - Allowance amount
- H - Credit amount for qualifying children under age 17
- I - Credit amount for other dependents

Tables > Tax/Deductions SessionTimer: 239 min and 36 sec

Save  Calendar Year: 2020 Retrieve Delete




Exemptions Income Tax FICA Tax Unemployment TRS Rates 457 Def Comp Workers' Comp Deduction Cd

Print

Allowance amount: 4,200.00  
Credit amount for qualifying children under age 17: 2,000.00  
Credit amount for other dependents: 500.00

Single/ Biweekly

Withholding Rate Schedule  
☒ Standard  
☐ Higher  
 Filing Status  
☒ Married filing jointly  
☐ Single or Married filing separately  
☐ Head of household

Delete	At least	But less than	The tentative amount to withhold is	Plus this percentage	of the amount that the Adjusted Annual Wage exceeds
	0	11,800	0.00	0.0%	0
	11,800	31,200	0.00	10.0%	11,800
	31,200	90,750	1,940.00	12.0%	31,200
	90,750	180,200	9,086.00	22.0%	90,750
	180,200	333,250	28,765.00	24.0%	180,200
	333,250	420,000	65,497.00	32.0%	333,250
	420,000	624,150	93,257.00	35.0%	420,000
	624,150	999,999	164,709.50	37.0%	624,150

Refresh Details + Add

## Human Resources Tables > Tax/Deductions > Earned Income Credit

☐ Removed this tab as it is obsolete.

## Human Resources > Tables > Workday Calendars > Accrual Calendar

☐ Corrected the sorting issue on the report.



## Human Resources > Maintenance > Staff Job/Pay Data > Pay Info

☐ Removed the **EIC Code** field as it is obsolete.

☐ Per IRS requirements, added the **W-4 Withholding Certificate** section with the following fields:

- **1: Filing Status**
- **2: Multi-Jobs**
- **3: Children under 17**
- **3: Other Dependents**
- **3: Other Exemptions**
- **4a: Other Income**
- **4b: Other Deductions**

Maintenance > Staff Job/Pay Data SessionTimer: 238 min and 38 sec

Save

Employee: 000006 : ADAMS, ADAM E. Retrieve Directory Documents

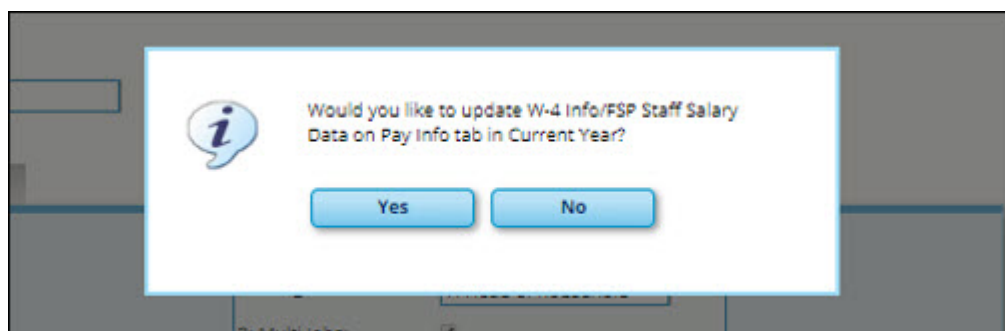
Employment Info Pay Info Job Info Distributions Deductions Leave Balance

Pay Status: 1 Active Tax Exempt: ☐  
 Pay Campus: 001 001 School Unemployment Elig: ☒  
 Pay Dept: ☐ FICA Eligibility: M Subject to medicare  
 Dock Rate: 252.381 W4 Marital Status: M Married  
 Nbr of Exemptions: 3

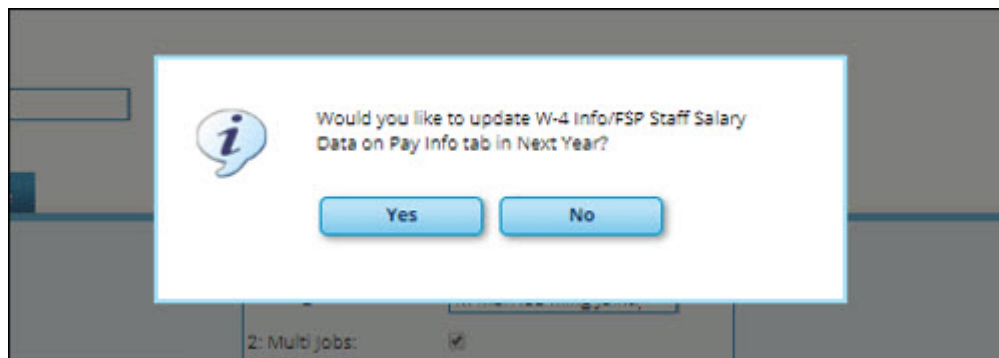
**W-4 Withholding Certificate**

1: Filing Status: M Married filing jointly  
 2: Multi-Jobs: ☒  
 3: Children under 17: 2  
 3: Other Dependents: 1  
 3: Other Exemptions: 500.00  
 4a: Other Income: 15000.00  
 4b: Other Deductions: 250.00

☐ Modified the program to provide an option to update the W-4 fields (new and existing) in the alternate pay frequency. For example, if the employee has an existing pay info record in the alternate pay frequency (CYR to NYR or NYR to CYR), a message is displayed prompting you to update the alternate pay frequency. If you accept the update, the new **W-4 Withholding Certificate** fields and the existing **W-4 Marital Status** and **Exemptions** fields are updated for the employee in the alternate pay frequency.







### Human Resources > Maintenance > Staff Demo > Responsibility

☐ Added validation to allow the following PE service IDs. Also, included the service IDs in the **Service ID** ellipsis.

- 02530004
- 02530005
- 02530006
- 02530007
- 02530008
- 82210XXX
- 82931XXX
- 83210XXX

### Human Resources > Maintenance > Hours/Pay Transmittals > Abs Ded

☐ Corrected the issue that caused an error message about having a salary adjust code to be displayed when using the duplicate feature to duplicate absence deduction and coded absence deduction transmittals.

### Human Resources > Payroll Processing

☐ Modified the payroll calculations to handle the withholding tax calculations based on the new IRS W-4 requirements. These changes are effective for pay dates beginning 1/1/2020.

### Human Resources > Payroll Processing > TRS Processing > Extract

☐ Corrected the RP20 extract to include the correct number of actual hours worked when the pay date has duplicate reported hours.

### Human Resources > Utilities > Install Salary/Tax Tables

☐ Per IRS requirements, the following changes were made to accommodate the new W-4 guidelines.

- Removed the **Fed Income Exempt** field from the **Tables** section.
- Removed the **Frequency** section as it is no longer applicable.
- Modified the **Fed Income Tax** table to accept import files without a pay frequency and with **Tax Rate Codes A-I**.

Utilities > Install Salary/Tax Tables SessionTimer: 239 min and 47 sec

**Tables**

- ☐ State Salary
- ☐ Job Code
- ☐ Fed. Income Tax
- ☐ FICA Tax Rates
- ☐ TRS Rates

**Current-Next Year**

- ☒ Current Year
- ☐ Next Year

**Process Specifications**

School Year: **2020**

Import Path: **None**  
( e.g. c:\rsccc2k\datafile.txt )

[Browse](#) [Execute](#)

## Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5100 - W-2 Forms

- ☐ Per IRS requirements, updated the W-2 forms and all W-2 functionality to support the 2019 tax year.
- ☐ Removed the **W2 Forms - 3 Up (U)** parameter option as this version of the form is no longer available.
- ☐ Modified the **Non-preprinted 3 Up (N)** parameter option to print the W-2 form instructions on the back of the form three times per page.
- ☐ Added the **Tax Year > 2018, Include instructions (Y/N) or Print instructions only (I)** parameter to indicate your printing preference for the W-2 form instructions when the **Non-preprinted 3 Up (N)** parameter option is selected and the tax year is greater than 2018. If the tax year is less than or equal to 2018, no instructions are printed on the back of the form regardless of the selection in this parameter.

Reports > HR Reports > Quarterly/Annual Reports > W-2 Forms SessionTimer: 235 min and 40 sec

[Return to Reports](#)

Report ID: HRS5100  
Frequency: 5  
User ID:

Parameter Description	Value
Validation Rpt (V); W2 Forms - Copy A (A); Non-preprinted 3 Up (N); or W2REPORT File (F)	V
For Tax Year > 2018, Include instructions (Y/N) or Print instructions only (I)	N
Final Run - Create W-2 Historical Record ? (Y/N)	N
Sort by Alpha (A), SSN (S), or Pay Campus (C)	A
Tax Year (####)	2019

[Run Preview](#)

[Clear Options](#)

- ☐ Modified the program to reference the **W-2 Print Options** section on the Human Resources > Tables > District HR Options page allowing you to select the amounts to be printed on the employee W-2 form (Box 14). This change also applies to W-2 forms printed from ASCENDER EmployeePortal.

☐ Modified the program to use the long version of the employee name when extracting names for W-2 forms. This change applies to the following parameter options: **Validation Report (V)**, **Copy A (A)**, and **Non-preprinted 3 Up (N)**. The program does not truncate characters for the **W2Report File (F)** option.

- The maximum length allowed for the full name is 28 characters.
- If the length of the full name exceeds the allowed length, the name is truncated.
- The middle name always displays a single middle initial.
- The first name may be truncated to a single initial depending on the length.

## Human Resources > Reports > HR Reports > Quarterly/Annual Reports > HRS5250 -1095-B Forms & HRS5255 - 1095-C Forms

☐ Corrected the issue that prevented the complete Social Security number from being on the Comparison report even if the **Print SSN (S)**, or **Masked SSN (M)** parameter is set to S.

## Human Resources > Reports > User Created Reports > HR Report

☐ Updated the **Pay Information** section as follows:

- Removed the **EIC Code** as it is obsolete.
- Added the new W-4 fields:
  - **Multi Job**
  - **Nbr Children**
  - **Filing Status**
  - **Nbr Other Depend**
  - **Other Deduct Amt**
  - **Other Exempt Amt**
  - **Other Income Amt**

Reports > User Created Reports > HR Report SessionTimer: 238 min and 50 sec

Save Create Report Delete Reset

Report Template

Public Retrieve Directory

Report Title

Employee Nbr: Active Employees Only

Pay Information

<input type="checkbox"/> Pay Stat	<input type="checkbox"/> Pay Campus	<input type="checkbox"/> Tax Exempt	<input type="checkbox"/> W4 Marital Status	<input type="checkbox"/> Unemployment Flg	<input type="checkbox"/> TRS Status	<input type="checkbox"/> TRS Begin Date	<input type="checkbox"/> FSP Staff Data Cd
<input type="checkbox"/> Pay Dept	<input type="checkbox"/> Campus Name	<input type="checkbox"/> Other Exempt	<input type="checkbox"/> EIC Code	<input type="checkbox"/> Health Ins Code	<input type="checkbox"/> End 90 Day Period	<input type="checkbox"/> Dock Rate	<input type="checkbox"/> W-4 Filing Status
<input type="checkbox"/> W-4 Multi-Jobs	<input type="checkbox"/> W-4 Children under 17	<input type="checkbox"/> W-4 Other Dependents	<input type="checkbox"/> W-4 Other Exemptions	<input type="checkbox"/> W-4 Other Income	<input type="checkbox"/> W-4 Other Deductions		

## Purchasing

### Purchasing > Maintenance > Create/Modify Requisition

☐ Corrected various page usability issues to improve the user experience.

**Purchasing > Maintenance > Receiving**

- ☐ Modified the program to exclude completed pending payable transactions.
  
- ☐ Modified the program to display a message indicating that one of the following conditions exists for the purchase order that was retrieved. The message is displayed again when the record is saved.
  - The purchase order is fully liquidated.
  - The purchase order has check transactions that were created using the Finance > Maintenance > Postings > Check Processing - PO tab.

**Purchasing > Maintenance > Receiving > Bundled/Bid Requisitions**

- ☐ Modified the program to create records in the pending payables table instead of the check or credit card transaction tables when receiving bundled requisitions.

## **Warehouse**

**Warehouse > Maintenance > Receive Inventory Items**

- ☐ Modified the program to exclude completed pending payable transactions.



## **Back Cover**